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“All the world’s a stage” and each has a role to play: A collaborative cross-unit metadata project in five acts

Abstract

As a result of the COVID-19 pandemic, the metadata team at Clemson University Libraries facilitated a work-from-home project, during which 14 employees across two units described a collection of over 2,400 photographs. From the standpoint of both the metadata reviewers and metadata creators, this session provided an overview of the project, including how it was managed remotely. This presentation reflects a balanced cross-unit perspective on what worked well and what could be improved.

Keywords

library, metadata, work-from-home, archives, project management, research

Cover Page Footnote

Thank you to each of the additional 11 partners who helped make this project a success: Brenda Burk; Jim Cross; Susan Hiott; Bree Johnson; Teresa McCoy; Melissa O’Neill; Carl Redd; Clayton Ruminski; Nolan Smith; Laurie Varenhorst; and Michelle Voyles.

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This conference proceeding reflects the content presented at the 2021 South Carolina Library Association Virtual Conference (Serrao et al., 2020). The authors are three members of the metadata team and four project partners representing 18 total employees who produced a metadata project from home. This collaborative presentation is from the standpoint of both the metadata team members who planned the project and provided support, and the metadata creators who were partners across the libraries implementing the work. This is how we did it and what we learned, in five acts. Acts one and two cover the workflows, documentation, and tools we used to get the project rolling and the expectations both the mentors and partners had at the onset of the project. Act three covers the mentors' and partners' views of how the metadata creation process went. Act four shares mentor and partner perspectives on the metadata review and quality control, and Act five summarizes what we learned, going over what worked well and what could be improved for future virtual collaborative projects.

To set the stage of our play, let us first introduce our cast:

- **Partners:** Fifteen libraries employees who partnered with the metadata team on the metadata project and were primarily responsible for creating the metadata records. Partners consisted of nine paraprofessional staff, five faculty librarians, and a library student worker within two units of the libraries--Special Collections and Archives and Technical Services and Collection Management.
- **Mentors:** Three libraries employees on the metadata team that coordinated the metadata project, provided guidance to the partners, and reviewed the metadata records for quality control. Mentors consisted of two faculty librarians and one paraprofessional staff in Technical Services and Collection Management whose primary job responsibilities are to oversee and implement digital collections metadata.

Last March, Clemson Libraries employees, like many across the country, found ourselves working from home due to COVID-19. So many library activities rely on the physical materials and people we serve that numerous employees did not have a workload to take home. The Dean of Libraries encouraged the metadata team to provide work that our colleagues could do remotely. The James F. Byrnes Collection (Byrnes, 1879-2007) was a prime candidate for a remote project. The 2,425-item photograph series had been digitized with donated funds and the digital files were stored on a network drive, which is accessible remotely through a virtual private network (VPN) connection. The preliminary metadata records had already been uploaded into our web-based metadata management system, CollectiveAccess (CollectiveAccess, 2021), so the metadata was already primed and ready for remote work.

The project was a nice size to tackle remotely--small enough to be manageable and large enough to split the work between several colleagues. It was also a great collection to learn metadata on because Special Collections and Archives (SCA) had provided basic descriptions and, as a political collection, many of the people and subjects are public figures and events, which are easier to research online. With an obligation to the donor to get this high-profile political collection online, and all the resources and tools in place to support virtual metadata work, the Metadata and Monographic Resources Team got to work prepping for the project.

Act I, Documentation

To direct and produce a successful metadata play across two units and 15 partners working remotely, we first needed sound and remotely accessible documentation of our metadata procedures and best practices. This provides the necessary structure for colleagues to learn new skills and, most importantly, helps improve metadata consistency across a large group of people. The metadata librarian reviewed and updated the Metadata Application Profile for Digital Collections (Clemson Libraries, 2020,

April) first. It had been tested and refined with three previous digital projects, but formatting updates helped it look clean and consistent and made the large document more navigable. These revisions included implementing headers in the Google Doc, which then generated a document outline. This allowed users to more easily jump to the section they needed to reference. Because it is stored on Google Drive, it is easily accessible online and can be accessed from home.

This application profile outlines Clemson Libraries' use of Qualified Dublin Core elements and controlled vocabularies, such as Library of Congress Subject Headings (LCSH), Library of Congress Name Authorities (LCNAF), Getty Art & Architecture Thesaurus for medium values, and GeoNames for geographic locations. We also create and manage an in-house controlled vocabulary of local subject headings in CollectiveAccess, and the application profile provides further guidance on using and applying these terms. Having an application profile also ensures the metadata complies with the South Carolina Digital Library metadata schema so that Clemson's digital collections can be aggregated on <https://scmemory.org/>. The application profile thus became our partners' script on how to create metadata following local, national, and international standards.

For each digital project the Libraries initiates, we also create a Project Charter (Clemson Libraries, 2020) to document project-specific workflows and metadata instructions that go beyond the universal metadata guidelines provided by the application profile. The metadata team creates these in collaboration with the SCA and Library Technology units. The Project Charter, which lives on the cloud-based Box storage system, supplied the partners with a list of elements to be used, which elements they are responsible for completing, and instructions on how to assign values to each element. The charter also contains a metadata appendix with guidelines that are specific to the individual project. For the Byrnes photographs, the appendix included possible access points to apply, such as LCSH and LCNAF already identified by SCA and terms specific to James Byrnes' political career.

Digital projects at Clemson Libraries already utilize the web-based project management site, Trello, to document workflows. We continued this practice for the Byrnes photographs. In the existing metadata queue, the metadata librarian created Trello cards for each box of materials and assigned each partner to the card/box they would be working on. With all these props in place, mentors were ready to introduce our partners to the project.

Act II, Orientation

Scene I, Procedural Orientation

To get the partners oriented, the metadata librarian created a web page on the Libraries' StaffWeb with procedures for starting metadata work - it included links to the metadata application profile and project charter as well as instructions on setting up an account in CollectiveAccess and Trello, how to remotely access digital files, and how to get started with metadata creation. The metadata librarian also created and linked to three video tutorials on using the CollectiveAccess interface on the StaffWeb page. This became the backbone of the mentors' training; a one-stop place where partners could go to get set up and acclimated to the work.

Scene II, Virtual Meeting

To accommodate our work-from-home situation, mentors held a virtual orientation meeting using Zoom to coach our partners on metadata work. This was the kick-off training session that introduced partners to the project. It provided an overview of what metadata is and why it matters, a brief look at CollectiveAccess to acclimate them to the platform they would be using, and a review of the training materials available on StaffWeb. Mentors also ensured partners that they would be supported throughout the process via mentoring and feedback. This orientation session was recorded so that partners who were unable to attend or who signed onto the project later could view it, and anyone could review it as a refresher.

After the orientation session, each partner received a next steps email that contained a link to the orientation recording, their individual metadata assignment, their unique CollectiveAccess login information, a list of next steps for accessing the StaffWeb training materials and getting started. It also contained their assigned metadata mentor's name. Since there are only three metadata team members participating and 15 partners, mentors envisioned a mentoring structure to help manage the individual support each partner might need throughout the project. By each mentor taking on a smaller group of 5-6 partners, they could dedicate more time for hands-on training, feedback, and answering questions that might arise. For quick virtual communication needs, mentors also set up a Metadata Projects channel on Microsoft Teams where our partners and mentors could chat, share ideas, get questions answered quickly, and learn about updates to the project.

Scene III, Mentor Expectations

This scene answers the question: What were the mentors' early expectations? In addition to moving the Byrnes project toward completion, mentors expected to familiarize faculty and staff partners from two units--our home unit of Technical Services and Collection Management and SCA--with metadata. The metadata team wanted to enlist individuals as fellow troupe members as they continue to promote collaboration within the Libraries' digitization program. Mentors also expected that, after some initial orientation and training, they would be able to delegate the task to the partners while mentors worked on other projects.

Scene IV, Partner Expectations

With partners from multiple units, one might imagine that partner expectations would be varied; and they were. While each partner came to the project orientation with individual expectations, there seemed to be some common expectations that were shared.

One expectation was to understand the nuts and bolts of the project. For many of the partners, participation on this project was in addition to other work responsibilities and assignments. Therefore, it

was important for partners to have a clear idea of both the time and intellectual commitment needed to dedicate to the project. In particular, partners wanted answers to:

- What was expected of partners?
- What could partners expect from the mentors?
- What was the overall workflow from start to finish?
- What was the timeline for the project?
- What tools and programs will partners need to learn?

In addition to understanding the nuts and bolts of the project, partners expected to learn how metadata is created at Clemson Libraries. Some partners expected to deepen their knowledge of what metadata is, learn about internal standards and practices established by members of the Metadata and Monographic Resources Team, and how to use external authorities for metadata creation. Other partners expected to learn how to make informed decisions regarding what metadata to create based on the information that could be surmised from the photographs. And partners expected to gain a greater understanding of the work our colleagues do on a day-to-day basis and how that work fits within their units and their own work.

The acquisition of skills or updating skill sets was another expectation of the partners participating in the project. Some partners expected to learn about how metadata is created and gain more experience using tools to manage metadata creation such as CollectiveAccess. Other partners expected to learn how to work with archival photographs collections. Lastly, the partners expected to have fun.

Act III, Creating Metadata

Scene I, Mentor Expectations

Mentors initially expected to be hands-off during the metadata creation stage of the project, but found they often needed to work closely with partners to troubleshoot metadata issues and answer questions. Some partners expressed interest in receiving further training post-orientation. This involved one-on-one video meetings in Microsoft Teams using the screen share function to provide walkthroughs of editing metadata records in CollectiveAccess. Walkthroughs showed partners how to navigate CollectiveAccess as well as how to input information into each metadata element while following best practices. Mentors found that these additional training sessions helped partners feel comfortable using CollectiveAccess and confident in creating metadata.

As with all team projects, consistent communication was the key to a smooth metadata creation process. It was the job of the mentor to work with their partners to determine what communication style was best for them. Preference for method of communication varied among partners, from weekly video meeting check-ins, to email, to the use of the Cataloger Note element in CollectiveAccess item records (and sometimes all the above). Above all, it was important that mentors and partners stay in touch with one another, and that partners could reach their mentor with questions when needed. Mentors tried to respond to partners in a timely manner, but it became apparent early on that it would be best if partners could talk to all members of the metadata team, not just the mentor assigned to them, to improve consistency and transparency. Mentors also thought partners would benefit from a group forum where they could discuss with each other the metadata problems – as well as solutions! – they were encountering. For this reason, mentors created the Microsoft Teams Metadata Projects channel; all mentors checked the channel regularly and were on hand to answer questions, enabling partners to receive more immediate feedback.

Scene II, Partner Expectations

In the course of participating in the project, partners had many questions about metadata policies and procedures such as:

- Should we spell out acronyms and abbreviations?
- If a location or a building has been renamed, should we use the name that was used at the time or should we use the most current name?
- How exhaustive do we need to be in our descriptions? and
- Is there a way to represent diacritics in CollectiveAccess?

Most questions were answered using Microsoft Teams, either by messaging the Metadata Projects channel or having virtual meetings within Teams with their mentor. Partners also used the Cataloger Note element in CollectiveAccess to ask questions and get responses. As a result, partners felt supported by the mentors and knew that no matter what the question was, answers were found quickly and effectively.

Scene III, Partners' Challenging Images

There were some types of images that presented challenges for partners when creating metadata. These challenges included:

- Images appearing out of place in a folder;
- The subject, date, or geographic location within the larger context of the box or folder contents, was either incorrect or not clear;
- Existing description generally given at the folder level--it was a challenge for partners to create item level descriptions from this, especially if the photograph seemed out of place in relation to the folder title;
- Issues with unidentified people and with cultural sensitivity in describing unknown individuals.

Partners used research to solve these problems and other issues related to context. This was especially helpful when an individual photograph seemed out of place or had people we could simply not identify. For example, partners used Google to find information that could be included in the Description element or the Cataloger Note.

In one photo of three men sitting around a table (none of them being James F. Byrnes), the partner used the names given in the original metadata to search Google with a question, “what did so-and-so have to do with James F. Byrnes?” What came up was enough information that led the partner to exactly what happened. The photograph was of a journalist, Selden Menefee, and two United States senators, Scott Lucas and Tom Connally, who were discussing foreign policy in a radio interview. Byrnes was supposed to be present, but instead sent a statement, because he was on his way to the Paris Peace Conference in 1946. The transcript of the entire interview, including Byrnes’ statement, was published in the August 4, 1946 issue of the *Department of State Bulletin*. The article even gave the date of the original radio broadcast. The broadcast date and article citation were not supplied in the original metadata, so they were added to the metadata record.

Act IV, Metadata Review

Scene I, Mentor Perspectives

Early in the project, mentors decided the best review practice was to have partners begin with a small, set number of records that mentors would then review and offer feedback. Ideally, mentors would have time to review these records before partners moved on in their assigned boxes so that partners could incorporate feedback as they continued their metadata work. Mentors hoped this would limit the amount of time partners needed to spend revising already completed records. However, mentors found that partners were quickly completing their records and the fast pace, compounded by

the ratio of five partners to one mentor, meant this was not always feasible from a mentor's perspective.

Mentors also found that the metadata aspects they expected to need revision were not the areas in which partners encountered problems. Mentors expected partners would struggle with identifying individuals in images and providing descriptions for images with little to no information. Instead, mentors found that partners struggled more with the limitations of search capabilities within CollectiveAccess when assigning values from controlled vocabularies and authorities such as Library of Congress Name Authority Files. Some partners were also unfamiliar with best practices for applying controlled vocabularies. Partners did very well identifying individuals, even going as far as providing enough biographical information to create local subject headings. Overall, mentors found that, while metadata quality varied across boxes, partners went above and beyond in describing their images.

Scene II, Partner Perspectives

The review process can normally bring on anxiety, especially for people new to the process, but it ended up being a more enlightening process for partners. Partners reported that their reviews were done in sections as they worked, instead of at the end. By doing this, partners were able to learn as they went through their records, cutting down on mistakes that would have to be dealt with upon completion. This method was possible because mentors give timely responses that allowed partners to build up their confidence. Having mentors respond quickly to questions and concerns helped partners with productivity and encouraged the team. For one partner, this bit-by-bit process allowed them to easily track their questions and answers from their mentor in a chart. Being able to organize their experience gave them a record of what they learned, and they can use these new skills on future projects.

Act V, What We Learned

As the curtain opens to Act V, you are probably curious to know how the play turned out. What did partners and mentors learn?

Scene I, Mentors Learned to Adopt New Practices

With each metadata project, mentors have encountered new situations. These challenges help to adjust and amplify our practices. The Byrnes Collection was no exception to what we observed in other collections. There were many persons in photographs that neither partners nor mentors could identify and, therefore, could not assign subject access to them. An innovative solution to this issue started from an unexpected source. A partner used the Library of Congress Subject Heading term “Anonymous persons” in a record. Instead of dismissing the suggestion, the mentors pondered how this idea could help deal with this recurring problem. But the term had to be analyzed carefully--Anonymous persons describes individuals who are trying not to be identified. From our point of view, we simply do not know who they are and cannot not presume to label them as recluses. The mentors then questioned what term would best fit the needs of the users of this metadata and at the same time avoid inaccurately ascribing a quality to these persons? Why not incorporate the neutral term of unidentified? Mentors agreed and established the term Unidentified persons in our local subject term list and communicated how to apply the term to partners during consultations, via email, and in the Metadata Application Profile.

Mentors also did not anticipate encountering foreign languages. Our metadata standards state that we transcribe language that appears in or around the image. For instance, a sign in a photograph or the caption that is visible on the image. When these details are in English, we copy them into the Description element. In the Byrnes Collection, a few Hebrew and French captions turned up. There were also four examples of Russian graffiti. In these cases, we had to translate as well as transliterate. Were

mentors thwarted by this? Fortunately, there were partners possessing expertise among the project participants or affiliated with the University. The lesson here is to not overlook your local experts.

Scene II, Mentors Learned What Went Well

Beyond some technical successes, mentors noted several gains. Mentors found partners to be good students of metadata procedure and they enjoyed conducting additional research. Many discovered astonishing facts that greatly supplemented or even corrected the original metadata. For instance, researching problem images lead mentors and partners to the Truman Presidential Library image collection. Communication with partners was successful, with each mentor finding the best channels to stay in touch with partners. In one mentor's experience, they scheduled weekly Teams meetings with their partners. They logged 27 hours of meeting time between May and September. There was also the delightful outcome that some of those who completed their assignments were asking for more chances to work on metadata.

Scene III, Mentors Learned What Could Be Done Better... Honestly

While there was a lot that went well with this project, mentors also encountered unexpected hurdles. First, mentors underestimated the amount of time they needed to invest in the metadata creation stage of the project. Originally, mentors planned minimal intervention after the initial orientation stages. This ended up not being true--mentors were consistently involved with providing feedback, editing records, and answering partner questions. Mentors also needed to be responsive to partners' requests for additional research to resolve questions or creation of local headings. For future remote collaborative projects, the metadata team will better plan out their time allocation to include one-on-one training and support. They will also plan scheduled and frequent feedback points with each partner to ensure timely guidance is provided. This will improve the quality of the partners' work early in the metadata creation stage and ensure less quality control will be needed at the end of the project. The

mentors will also use the amount of time spent on the Byrnes project as a baseline to estimate time requirements for future projects.

Second, mentors quickly realized the projected completion date was not feasible, mostly due to the amount of time partners had to devote to the project while balancing their regular job duties. While the project was initially planned to be finished in August 2020, the timeline was extended as partners began returning to their work sites on campus. While some of the shift in time commitments was unpredictable due to COVID-19 restrictions and partners returning to their normal duties, the mentors could have worked with each partner to guarantee a specific weekly time commitment to complete their assigned records. Mentors could have then divvied up the number of metadata records assigned based on that time commitment. The project completion date was also a bit nebulous because Clemson Libraries has only recently embarked on time trials and pilot testing for metadata projects to improve timeline estimates. The Byrnes project will provide another data point for mentors to use in estimating timelines for future projects.

Third, mentors who had not done quality control before were a little overwhelmed. In particular, mentors found that it took less time for partners to complete a record and more time for mentors to quality control and provide meaningful feedback. Partners began pulling ahead of mentors, leaving some boxes with minimal or no quality control prior to partners finishing. Mentors had to play catch up. Because consistent metadata issues were not caught in time, mentors had more work to do making revision suggestions and editing records on the back end. This led to some issues with consistency of metadata quality. This was particularly obvious when metadata quality varied for photos of the same topic between boxes. This could also be resolved with mentors planning scheduled and frequent feedback points with each partner to ensure timely guidance is provided.

Scene IV, Partners Learned What Went Well

There were many factors that contributed to this successful project from the partner's view. One major factor was the excellent training that partners received at the beginning of the project. The documentation was extensive and well rounded. From this training script, partners were able to find answers to common metadata formatting questions. Also, the partners learned how to use CollectiveAccess from the video tutorials, which allowed for multiple viewings when a refresher was needed. Another key factor was a steady stream of communication between mentors and partners. The technology available in virtual meetings such as the screen share function allowed the partner and mentor to evaluate difficult images and to deliberate how best to address them. Also, the Microsoft Teams channel provided a chat option for quick communication between the partners and the mentors. Through this experience, partners have not only increased their understanding of the metadata process but also successfully contributed to a cross-departmental project.

Scene V, Partners Learned What Could Be Done Better... Honestly

When the partners evaluated what could be improved upon, only a couple of issues were voiced. A key issue that came up for everyone was the question concerning how much information was enough. While the mentors addressed these questions as they came up, this was a continuous challenge for partners to navigate. Another factor was the difficulty in naming some unidentified persons. Since the collection was broken into boxes and assigned to different partners, an individual might be named in one box but not in another box. A common board of unidentified persons would have been helpful. Due to the thoughtful preparation of the mentors, the partners saw few issues that needed refinement. Overall, this project from the partners' view was a success as well as enjoyable.

Coming Attraction!

Coming soon! The Byrnes collection is coming to a website near you! So, keep your eye out for this new digital collection at our Clemson University Libraries Digital Collections website (Clemson Libraries, n.d.). In only seven months, the team is about 75% of the way through the 2,400 photographs. This is no small feat for our small but mighty crew, especially since this progress occurred in the face of additional changing roles and priorities that we all juggled while working from home. This was a fun project and a great way for Libraries colleagues to work closely together while being physically apart, and it gave us all an opportunity to grow new skills. The 15 partners and 3 mentors came together to enact a synchronized and successful play. They were a stellar cast!

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